

Bulletin Number: NY_IB_0004	Distribution Date: 12/29/2025	Effective Date: Ongoing
Contact Point: Metrc Support	Subject: Operational Exception Reporting	
Reason: To provide guidance on Operational Exception reporting		

Greetings,

Metrc is pleased to provide guidance on how to notate if your business is not yet operational through a feature called Operational Exception in the Metrc system. By following the Operational Exception process in Metrc, licensees are indicating to the OCM that operations are not taking place for a certain period of time.

Please find details regarding the Operational Exception process on the following pages.

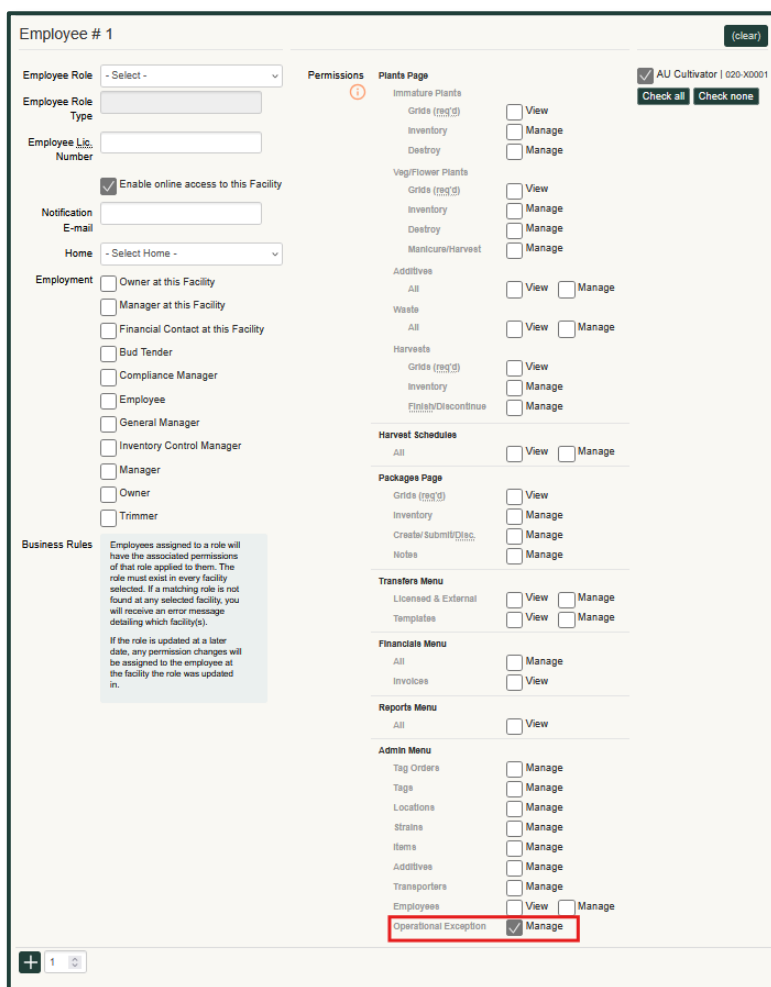
Operational Exception

Any licensees who are either not yet operational or have planned time periods where operations will not take place at their licensed facility should utilize **Operational Exception** to report this pause in operations to the OCM.

Example: Outdoor Cultivators who do not grow plants in the winter months.

Please see below for a step-by-step guide on using Operational Exception functionality in Metrc:

1. Confirm the employee that will be utilizing this functionality has Operational Exception permissions granted by the Metrc Admin – **see Figure 1**. This can be done by selecting Employees under the Admin area on the navigational toolbar.



Employee # 1 (clear)

Employee Role: - Select -

Employee Role Type: [input type="text"]

Employee Lic. Number: [input type="text"]

☒ Enable online access to this Facility

Notification E-mail: [input type="text"]

Home: - Select Home -

Employment

- ☐ Owner at this Facility
- ☐ Manager at this Facility
- ☐ Financial Contact at this Facility
- ☐ Bud Tender
- ☐ Compliance Manager
- ☐ Employee
- ☐ General Manager
- ☐ Inventory Control Manager
- ☐ Manager
- ☐ Owner
- ☐ Trimmer

Business Rules

Employees assigned to a role will have the associated permissions of that role applied to them. The role must exist in every facility selected. If a matching role is not found at any selected facility, you will receive an error message detailing which facility(s).

If the role is updated at a later date, any permission changes will be assigned to the employee at the facility the role was updated in.

Permissions

Plants Page

- Immature Plants
 - Grids (tag'd) [input type="checkbox"/> View
 - Inventory [input type="checkbox"/> Manage
 - Destroy [input type="checkbox"/> Manage
- Veg/Flower Plants
 - Grids (tag'd) [input type="checkbox"/> View
 - Inventory [input type="checkbox"/> Manage
 - Destroy [input type="checkbox"/> Manage
 - Manicure/Harvest [input type="checkbox"/> Manage
- Additive
 - All [input type="checkbox"/> View [input type="checkbox"/> Manage
- Waste
 - All [input type="checkbox"/> View [input type="checkbox"/> Manage
- Harvests
 - Grids (tag'd) [input type="checkbox"/> View
 - Inventory [input type="checkbox"/> Manage
 - Plants/Discontinue [input type="checkbox"/> Manage
- Harvest Schedules
 - All [input type="checkbox"/> View [input type="checkbox"/> Manage
- Packages Page
 - Grids (tag'd) [input type="checkbox"/> View
 - Inventory [input type="checkbox"/> Manage
 - Create/Submit Rec. [input type="checkbox"/> Manage
 - Notes [input type="checkbox"/> Manage
- Transfers Menu
 - Licensed & External [input type="checkbox"/> View [input type="checkbox"/> Manage
 - Templates [input type="checkbox"/> View [input type="checkbox"/> Manage
- Financials Menu
 - All [input type="checkbox"/> Manage
 - Invoices [input type="checkbox"/> View
- Reports Menu
 - All [input type="checkbox"/> View
- Admin Menu
 - Tag Orders [input type="checkbox"/> Manage
 - Tags [input type="checkbox"/> Manage
 - Locations [input type="checkbox"/> Manage
 - Strains [input type="checkbox"/> Manage
 - Items [input type="checkbox"/> Manage
 - Additive [input type="checkbox"/> Manage
 - Transporters [input type="checkbox"/> Manage
 - Employees [input type="checkbox"/> View [input type="checkbox"/> Manage
 - Operational Exception [input checked="" type="checkbox"/> Manage

Check all Check none

AU Cultivator | 020-X0001

Figure 1: Permission for Operational Exception for a User

2. Once the permission has been granted, go to the Admin area dropdown and select the Operational Exception option – **see Figure 2**.

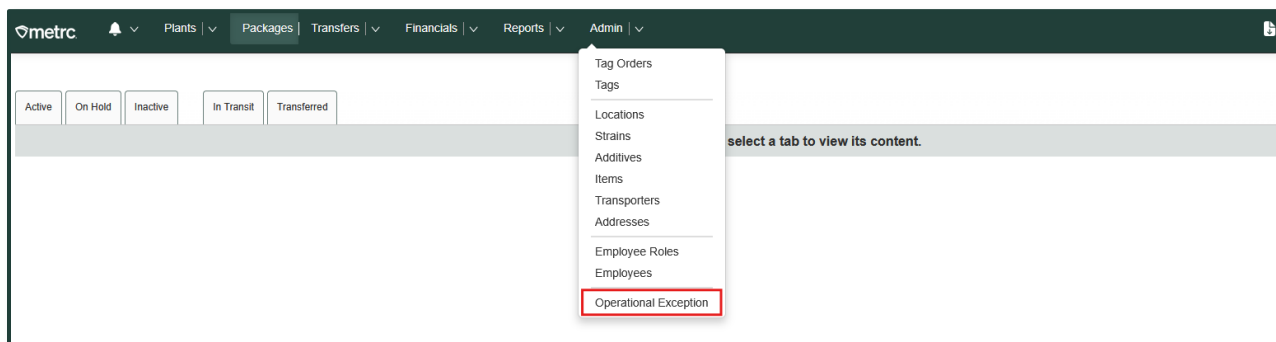


Figure 2: Operational Exception option

3. This will open the Operational Exception grid, then select the "Add Operational Exception" button – **see Figure 3**.

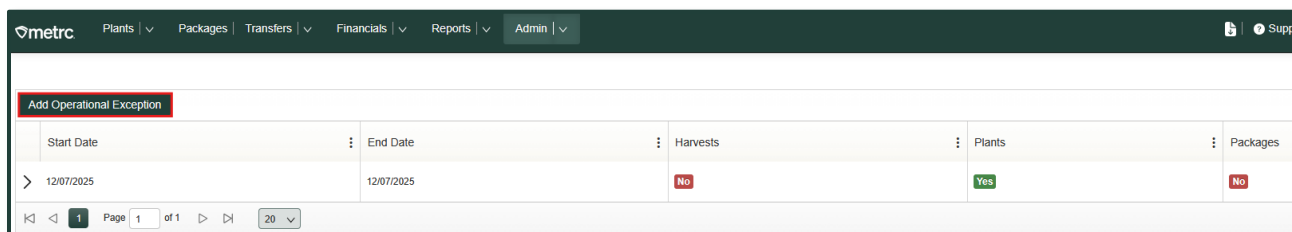
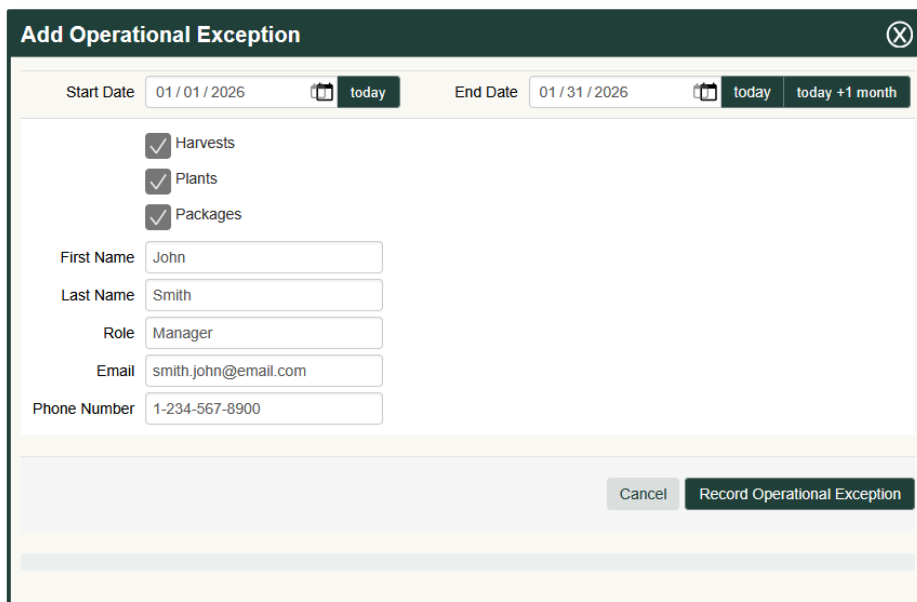


Figure 3: Add Operational Exception button

4. The Operational Exception action window will appear – **see Figure 4** below.
When recording an Operational Exception fill out all required fields, including:
 - Start and end dates. For example, if you will not be operational in January, select January 1, 2026, as the start date and select the end date of January 31, 2026.
 - What items will be impacted by this pause, including Harvests, Plants, and/or Packages.
 - The information of who is completing the report including the First Name, Last Name, Role, Email, and Phone Number of that employee reporting.



Add Operational Exception

Start Date: 01/01/2026 today End Date: 01/31/2026 today today +1 month

☒ Harvests
☒ Plants
☒ Packages

First Name: John
 Last Name: Smith
 Role: Manager
 Email: smith.john@email.com
 Phone Number: 1-234-567-8900

Cancel Record Operational Exception

Figure 4: Add Operational Exception action window

- To finalize the report, select "Record Operational Exception" at the bottom of the action window – **see Figure 5.**

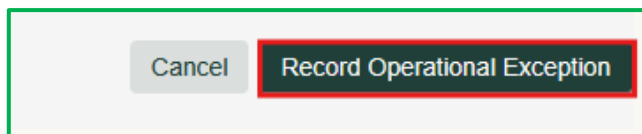
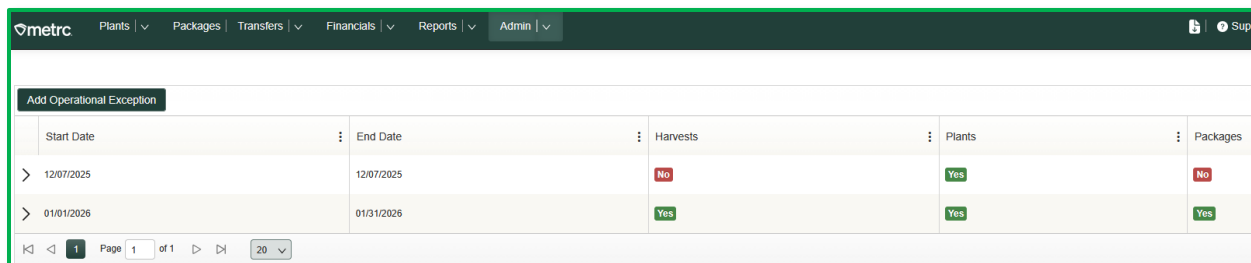


Figure 5: Record Operational Exception button

- The completed report will appear in the Operational Exception grid – **see Figure 6.**



Start Date	End Date	Harvests	Plants	Packages
> 12/07/2025	12/07/2025	No	Yes	No
> 01/01/2026	01/31/2026	Yes	Yes	Yes

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Figure 6: Operational Exception grid

Metrc resources

If you have any questions, or need additional support, the following resources are available:

Contact Metrc Support by navigating to [Support.Metrc.com](https://support.metrc.com), or from the Metrc system, click the Support area dropdown on the navigational toolbar and click support.metrc.com to redirect to the portal.

Please note: If accessing the portal for the first time, a username (which is established when logging in), the respective state and “Facility license number”, and a valid email to set a password are required.

Metrc Learn: Metrc Learn offers interactive educational opportunities to enhance Metrc system users’ skills and provide various training options based on experience level.

In addition, the learning system is organized into facility-specific programs made up of various courses. To log in or register for an account, visit [Metrc Learn](#).

Metrc Expert: For in-system guidance, to ask questions, or live chat with support, check out our in-system knowledge base. Just click the widget in the bottom right corner of the screen once you log in to the Metrc system.

Thank you for your continued partnership.